Children's Registry and Information System
Data Facilitator Manual

CHILDREN'S REGISTRY & INFORMATION SYSTEM
fdlrs
C·H·R·I·S

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About This Manual

The purpose of this manual is to instruct Children's Registry and Information System (CHRIS) data facilitators in the use of the data facilitator tools provided in CHRIS. These tools were designed to assist data facilitators in maintaining a well-organized database environment.

For additional information on the CHRIS Project, refer to the *User Manual*, *Reports Manual*, and *Field Reference Guide*. All support documentation can be retrieved from the CHRIS website at http://www.chris.miami.edu.

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Legend

The following is a list of conventions used throughout this manual:

Bold	The titles of CHRIS screens and screen sections are presented in **bold-faced type**.
Italics	Field names, as well as references to tables, figures, and hands-on exercises, are presented in *italics*.
UPPERCASE	CHRIS buttons and main menu options are presented in UPPERCASE letters.
Title Case	CHRIS-related reports, functions, and lists (e.g., Duplicate Child Report, Child Record Locator, Code List) are presented in Title Case.
IMPORTANT	The IMPORTANT icon is used in the left margin to highlight information essential to the integrity and/or performance of CHRIS.
NOTE	The NOTE icon is used in the left margin to highlight information that deserves special attention.
WARNING	The WARNING icon is used in the left margin to highlight information on how to avoid a potential problem or issue in CHRIS.
	The HANDS-ON icon is used in the left margin to indicate a hands-on exercise to be completed by the user.

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Data Facilitator Responsibilities

CHRIS data facilitators are the primary contacts for CHRIS users at the Florida Diagnostic and Learning Resources System (FDLRS) centers. They also serve as center liaisons to the CHRIS project. Data facilitators play a crucial role in maintaining an accurate database and, as such, are an extremely important part of the CHRIS project.

The data facilitators are expected to ensure data integrity, provide on-site support, upgrade hardware and software, coordinate training, create reports, and install the Citrix client. Detailed descriptions of these specific responsibilities of CHRIS data facilitators are provided below.

Data Integrity

Data facilitators are responsible for ensuring the integrity of the data contained in the CHRIS database. This is accomplished through data facilitator oversight of data security, data entry, and database management.

Data Security

User Access
The CHRIS database may only be accessed by authorized users. Data facilitators are responsible for assigning users to CHRIS and determining the proper access level for each user. The following levels of access are available in CHRIS:

1. Record Access
- County Access – Access to the data of one or more counties
- Site Access – Access to the data of all the counties in one site
- Center Access – Access to the data of all the counties in one center

2. Record Edit Access
- View only
- View and edit
- View, edit, and delete Service Coordination events and significant adults

3. Field Level Access
- Access to Medicaid number and Social Security number

Login Information
User profiles, including login information and access level, are created and maintained by the CHRIS Help Desk staff. All users must have their own username and password. No community logins are allowed. Users must keep their usernames and passwords secure. They should not be shared or posted on the computer.

Data facilitators are responsible for completing the appropriate form to notify the Help Desk if a user account needs to be added or removed. The *New User Data Form* must be completed to add a user account and an *Inactive User Data Form* must be completed to remove a user account. Both forms are available on the CHRIS website at http://www.chris.miami.edu.

IMPORTANT

In order to maintain accurate user accounts, data facilitators should notify the Help Desk when a user leaves and, therefore, should no longer have access to CHRIS.

Data Entry Rules

The data facilitator should monitor the data entered into CHRIS to ensure that all data entry rules are being followed. Users should be educated on site-specific data entry rules and on the use of drop-down lists to maintain data consistency.

Data Formats
Extra care should be taken when entering data into name fields (e.g., *First Name*, *Last Name*). Names should always be entered with proper capitalization. Names will appear exactly as they were entered on all reports and mailings generated from CHRIS.

All dates should be entered using the following format:
- Use only four digit years
- Use only slashes (/) to separate the month, day, and year
- For example: 05/21/2015

Modification of field formatting, such as font type, font size, or font color, should be done only in report layouts. Formatting should not be modified on data entry screens.

Free Text Fields
Guidelines should be set by each center as to how information should be entered in free text fields. A good example of the importance of consistency in a free text field is the *First Name* field in the **Significant Adults** section of the **Child Demographic Information** screen. The names of one or both parents can be entered in this field. The data entered into the *First Name* field will dictate what should be entered in the *Relation* and *Courtesy Title* fields. These decisions should be made based on how the fields are used for reports and correspondence.

Drop-Down Lists
Drop-down lists help maintain data consistency. Many fields in CHRIS can be entered only by using drop-down lists. Statewide drop-down lists can only be modified by the CHRIS Help Desk and only after approval from the Technical Assistance Work Group (TAWG). Any requests for additions or changes to the statewide lists should be submitted to the CHRIS Help Desk or TAWG.

Site-defined drop-down lists can be modified by the data facilitator or other users approved by the data facilitator. An agreement should be made among the users at each center on how those fields will be used to maintain consistency in data entry. The data facilitator should educate new users on how to use these fields. For detailed instructions on how to add, update, or inactivate entries in site-defined drop-down lists, see the Definitions section of this manual.

Timeline Guidelines
All timeline data must be entered according to the Timeline Guidelines, which are available in the *User Manual*. The data facilitator should educate local users on any site-specific conventions for entering Timeline data.

Service Coordination Events
The use of the Service Coordination events must be consistent among users at each site. Data facilitators should inform users as to how these events are used for case management. It is crucial that guidelines be set and followed so that CHRIS can generate meaningful reports and be a useful case management tool.

Database Management

Duplicate Record Reduction

Duplicate records are problematic because they cause data entry and reporting errors, as well as result in inefficient case management. Every effort should be made to avoid the creation of duplicate records in the CHRIS database. Data facilitators should instruct all users to search for potential duplicates using the **Child Record Locator** screen prior to creating a new record.

Record Transfer

The Record Transfer program was created to prevent the duplication of records when a child moves to another county in Florida. Data facilitators should use this program to transfer records from one county to another once it has been verified that the child moved. Only the data facilitator has the administrative access required to transfer the child's record to another county within CHRIS. For detailed instructions on how to transfer a child's record, see the Record Transfer section of this manual.

On-Site Support

Data facilitators serve as the users' primary contact for program-related issues and should provide basic assistance to local users. If the data facilitator is not available, users should contact the Help Desk for assistance. Data facilitators should contact the Help Desk directly for assistance with complex issues or to report any issues with the CHRIS program.

Data facilitators may be asked by the Help Desk to contact their local Information Technology (IT) Department for further assistance with network and Internet connectivity issues.

Training

Data facilitators are responsible for scheduling appropriate trainings for themselves and other CHRIS users. Data facilitators should also distribute project updates and information to all local CHRIS users.

NOTE

Contact the Help Desk to schedule a training session.

Reports

All users can generate reports in CHRIS. The **Reporting** screen (see Figure 1) contains a list of reports that have been configured to generate results automatically according to site-specific requests. Additional assistance may be required from the data facilitator to help users identify the correct find request and report option to produce the desired results. In addition, custom reports can be created using the Reporter program. Data facilitators and other trained users can create customized reports and make them available to all users. Additional information on reports frequently used by data facilitators can be found in the Reports section of this manual. For detailed instructions on creating standard and custom reports, see the *Reports Manual* and *Advanced Reports Manual*.

Citrix

Citrix provides secure access to data via the Internet from a single centralized master database while maintaining local case management functionality. The implementation of sophisticated security measures ensures the confidentiality of children's records throughout the CHRIS system.

The data facilitator is responsible for setting up, configuring, and maintaining the Citrix client program for each workstation. For detailed information on Citrix, see the Citrix section of the CHRIS website at http://www.chris.miami.edu.

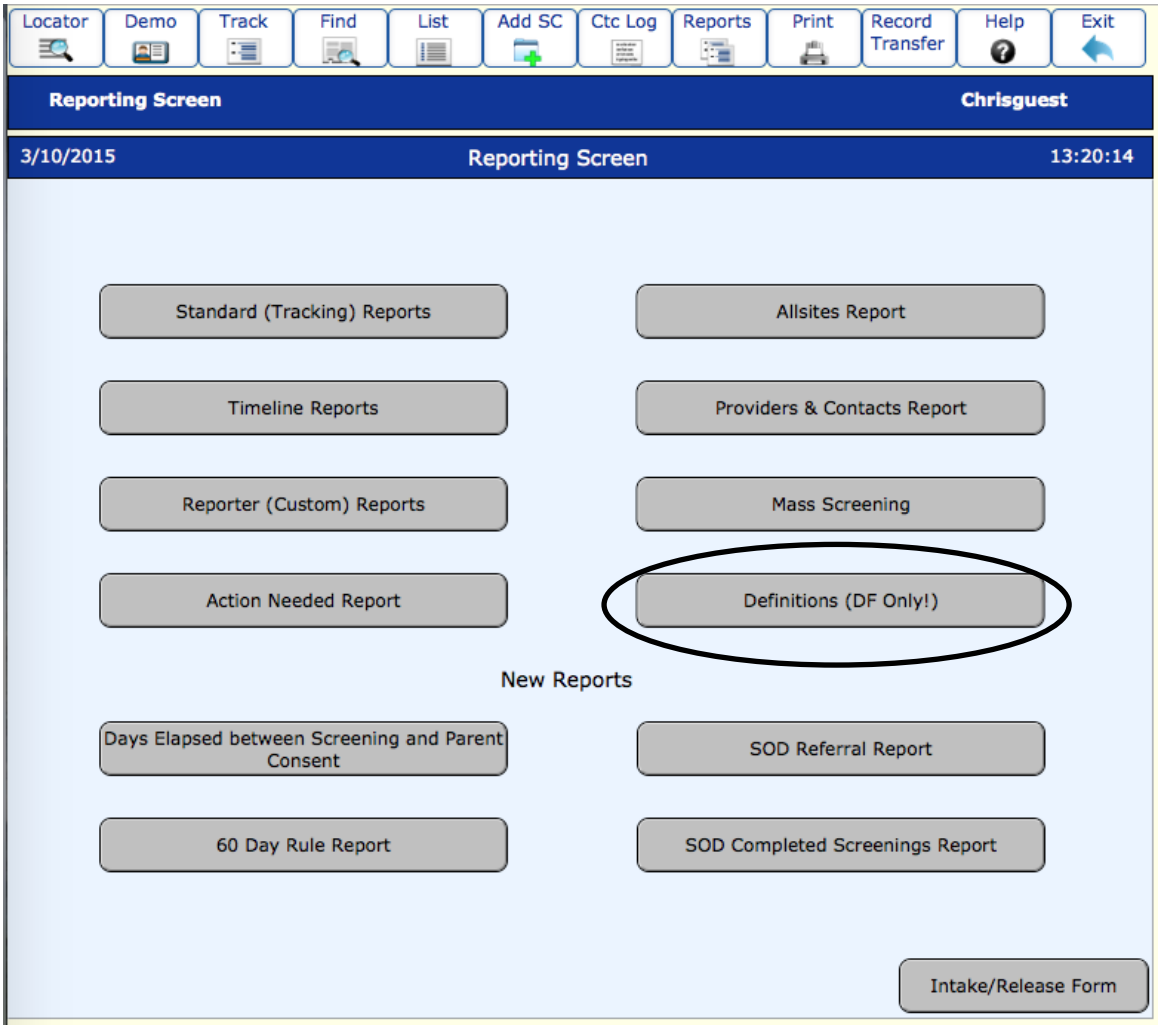
Data Facilitator Tools

The two primary tools that data facilitators must become familiar with are the Definitions and Record Transfer tools. From the **Definitions** screen, data facilitators can customize site-defined lists as well as add and edit providers and contacts. From the **Record Transfer** screen, data facilitators can transfer records from one county to another. The buttons for the Definitions and Record Transfer tools are visible to all CHRIS users, but only data facilitators can access these screens. A detailed description of the data facilitator tools available in CHRIS is provided in the pages that follow.

Definitions

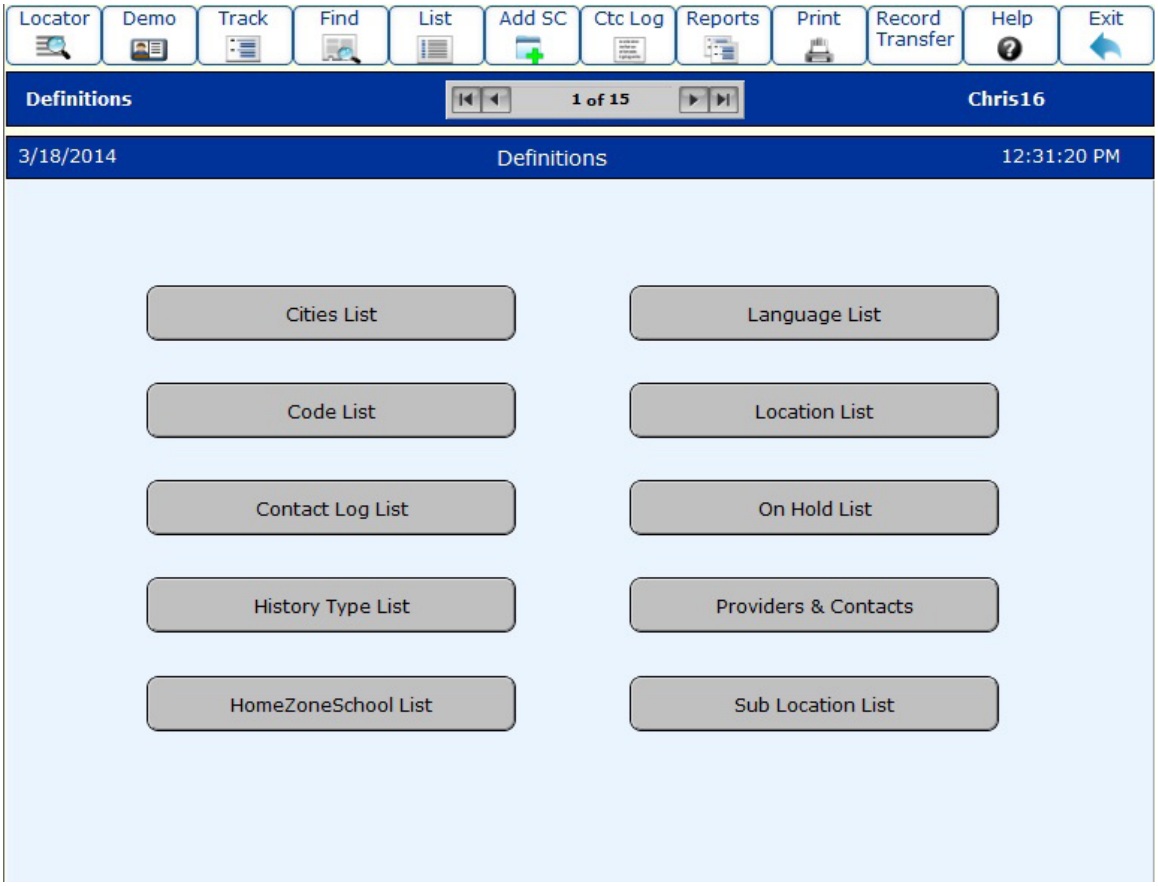
The DEFINITIONS option is located in the CHRIS **Reporting** screen (see Figure 1).

FIGURE 1 **Reporting Screen**



Selecting the DEFINITIONS option from the **Reporting** screen will display the **Definitions** screen (see Figure 2). This screen displays the options that allow data facilitators to access site-defined lists.

FIGURE 2 **Definitions Screen**



Site-Defined Lists

Many of the drop-down lists in CHRIS contain information that can be customized for each site. Data facilitators can modify these site-defined lists so that the drop-down lists reflect information pertinent to each individual FDLRS site. A description of each of the lists available in CHRIS is provided in Table 1.

TABLE 1 **Site-Defined Lists Table**

List	Description
Cities List	The Cities List contains a list of local cities. This list is used as a locator for the adult and the child referenced. It can be used for mailing or for case management visitation.
Code List	The Code List is locally defined. Users should agree on how this field will be used. This information can be used for reporting or sorting records.
Contact Log List	The Contact Log List contains reasons for tracking a Contact Log event.
History Type List	The History Type List contains the service types the child may have received prior to being referred to FDLRS.
Home Zone School List	The Home Zone School List represents the location at which the child is receiving services. It may be the home or the name of an agency, school, childcare provider, or any other location where the child is receiving services. This list is used to generate reports for Service Coordination and program planning.
Language List	The Language List contains the most common languages used in the site's area. It is used to identify the primary language the child uses to communicate. This may or may not be the primary language the child uses to communicate in the home. Because it is necessary to conduct screenings and evaluations in the primary language of the child, all options should be available in the list.
Location List	The Location List contains the location of an appointment or screening. This information is used for Service Coordination and is helpful in arranging schedules and transportation. It can also be used as a reference when communicating with service providers or for providing directions to parents.
On Hold List	The On Hold List contains reasons describing why a child's record is on hold.
Providers & Contacts List	Providers are organizations that provide services that are regulated by FDLRS and the Florida Department of Education (FDOE). Contacts are employees within a provider organization who facilitate supplying a care service. This screen allows each site to manage the providers and contacts appropriate for their site.
Sub Location List	The Sub Location List is locally defined. Users should agree on how this field will be used. Some options are: school number, area or region of service, school or service location name, or other location. This field is only useful if local parameters have been defined for its use. It may be used to generate reports or identify service needs.

Site-Defined List Management

Management of the site-defined lists is identical for all lists with the exception of Providers & Contacts. Therefore, as an example, management functions will first be described using the Cities List (see Figure 3). The functions described apply to all other lists except Providers & Contacts. A detailed description of Providers & Contacts is provided beginning on page 14.

FIGURE 3 **Cities List Screen**

Add a City
To add a city to the Cities List, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

Step 3. Select the CITIES LIST option. The **Cities List** screen will be displayed (see Figure 3).

Step 4. Select the NEW option from the menu. The **Cities List** screen will now be displayed with a new field to enter a city (see Figure 4).

FIGURE 4 **Cities List Screen**

Step 5. Type the full name of the city to be added in the space provided. The city added will appear selected (e.g., an "X" will be displayed in the checkbox). Only cities that have been selected will be displayed in the corresponding drop-down list.

Step 6. Select the UPDATE LIST option from the menu and the city will be added to the list in alphabetical order.

NOTE

To select a city, click within the checkbox next to the city name. Clicking within the checkbox will toggle between adding an "X" to the box and removing the "X" from the box. If there is an "X" present in the checkbox, the city will be included in the associated drop-down list. If there is no "X" present in the checkbox, the city will not be available for selection from the drop-down list. Any changes made to the records will not be completed until the UPDATE LIST option is selected.

Edit a City

To edit a city in the Cities List, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

Step 3. Select the CITIES LIST option. The **Cities List** screen will be displayed (see Figure 3).

Step 4. Select on the city name and modify the text.

Step 5. Select the UPDATE LIST option from the menu and the city will be added to the list in alphabetical order.

Hands-On Exercise 1: Modify a list in the Definitions screen

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the LANGUAGE LIST option.
4. Select the NEW option from the menu.
5. Enter the following text: Portuguese
6. Select the UPDATE LIST option.
7. Select on the language name that was just added and edit it to display the following text: Portuguese/Spanish
8. Select the UPDATE LIST option.
9. Select the EXIT option from the menu to return to the **Definitions** screen.

Providers & Contacts

Providers are organizations that provide a care service. This includes organizations that provide services to the child or provide services to the family that impact the child (e.g., Aid to Families with Dependent Children, Medicaid, Food Stamps, Social Security Income, Civilian Health And Medical Program of the Uniformed Services). Tracking the services the child receives can be used to support Service Coordination and reduce duplication of services.

Contacts are employees within a provider organization who facilitate supplying a care service.

Add a New Provider

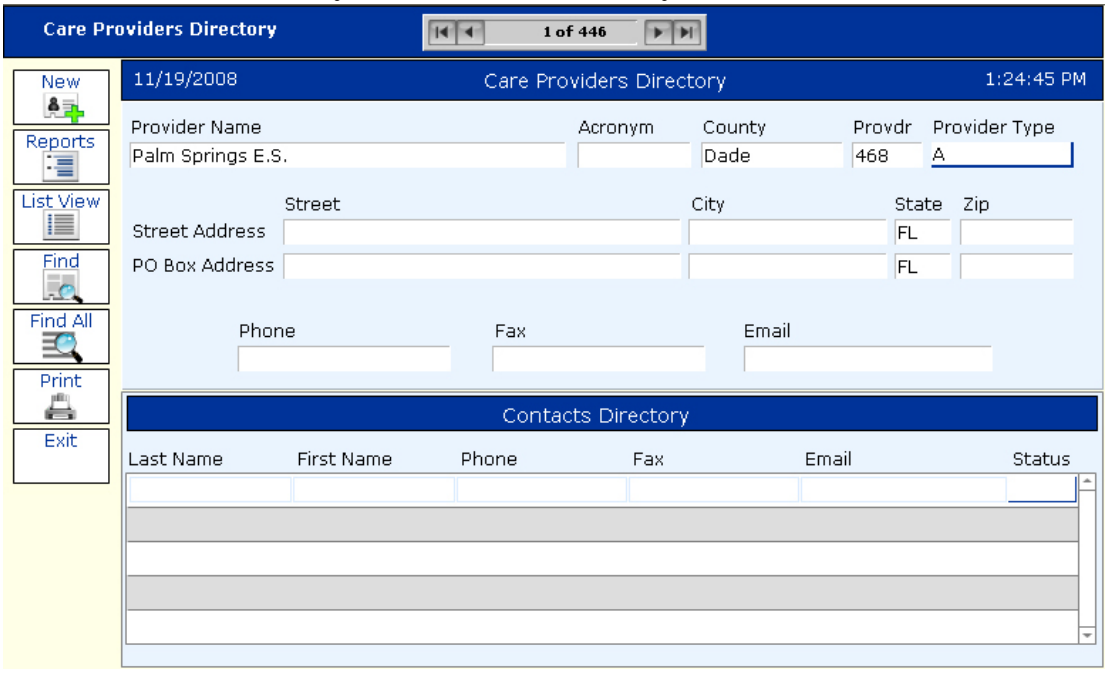
To add a new provider in CHRIS, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

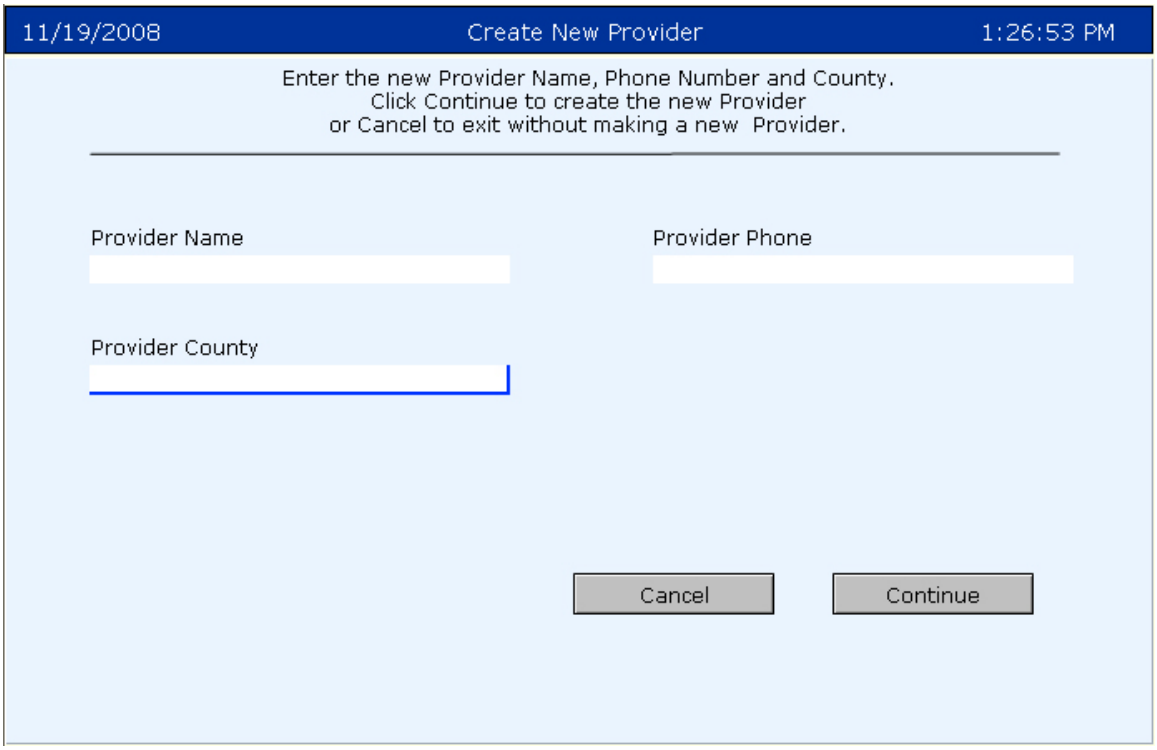
Step 3. Select the PROVIDERS & CONTACTS option. The **Care Providers Directory and Contacts Directory** screen will be displayed (see Figure 5).

FIGURE 5 **Care Providers Directory and Contacts Directory Screen**



Step 4. Select the NEW option from the menu. The **Create New Provider** screen will be displayed (see Figure 6).

FIGURE 6 **Create New Provider Screen**



Step 5. Fill in all the fields with the appropriate information.

Step 6. Select the CONTINUE option. The program will check for a duplicate provider name and phone number and then the **Care Providers Directory** screen will be displayed (see Figure 5).

Step 7. Enter any additional information needed for the provider.
Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.

Add a New Contact
To add a new contact in CHRIS, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The **Care Providers Directory and Contacts Directory** screen will be displayed (see Figure 5).

Step 4. Select the FIND option from the menu.

Step 5. Enter the search criteria to locate the corresponding provider for the new contact you want to add.

Step 6. Press the Enter key on the number pad to perform the find.

Step 7. Enter the new contact information in the fields provided.
Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.

Hands-On Exercise 2: Add a provider and contact

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the PROVIDERS & CONTACTS option.
4. Select the NEW option from the menu.
5. Enter the following information in the Care Providers Directory:
   Provider: Miami Care Center
   Provider Phone: (305) 284-5555
   Provider County: Dade
6. Select the CONTINUE option.
7. Enter additional information:
   Provider Type: A (Active)
8. Enter the following information in the Contacts Directory:
   Last Name: Charles
   First Name: Mary
   Phone Number: (305) 284-5151
   Fax: (305) 284-6991
   Email: mcharles@mcc.org
   Status: A (Active)
   Note: Changes are immediately saved.
9. Select the FIND ALL option from the menu to view a full list of providers.
10. Select the LIST VIEW option to view all records.
11. Select the EXIT option to return to the **Reporting** screen.

Edit a Provider or Contact
To update a provider or contact in CHRIS, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The **Care Providers Directory and Contacts Directory** screen will be displayed (see Figure 5).

Step 4. Select the FIND option from the main menu.

Step 5. Enter provider or contact information in the appropriate fields.

Step 6. Press the Enter key on the number pad to perform the find.

Step 7. Modify the provider or contact information as needed.
Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.

IMPORTANT

Select "A" from the *Provider Type* field drop-down list if the provider is active, and the provider name should appear in the drop-down lists in the **Tracking Summary** and **Event Detail** screens. Select "X" if the provider is inactive and should no longer appear in the drop-down lists. In the *Status* field, select "P" if the contact should only be displayed in the *Referred By* field in the Referral First Contact with FDLRS and Referral In events.

Inactivate a Provider or Contact

Provider and contact records that are deleted from CHRIS cannot be recovered or restored. Therefore, a child's record that references a deleted provider or contact will not contain any information in those fields. Due to the severe consequences of data loss, CHRIS provides the option to flag old provider and contact names as inactive. Marking records as inactive will remove those providers and contacts from drop-down lists in the **Tracking Summary** and **Event Detail** screens, but inactive provider and contact information will continue to be stored in existing child records.

To inactivate a provider or contact, complete the following steps:

Step 1. Select the REPORTS option from the main menu. The **Reporting** screen will be displayed (see Figure 1).

Step 2. Select the DEFINITIONS option. The **Definitions** screen will be displayed (see Figure 2).

Step 3. Select the PROVIDERS & CONTACTS option. The **Care Providers Directory and Contacts Directory** screen will be displayed (see Figure 5).

Step 4. Select the FIND option from the main menu.

Step 5. Enter provider or contact information in the appropriate fields.

Step 6. Press the Enter key on the number pad to perform the find.

Step 7. Select "X" from the *Provider Type* drop-down list to inactivate the provider, or select "X" from the *Status* drop-down list to make the contact inactive.
Note: Changes are immediately saved.

Step 8. Select the EXIT option from the menu.

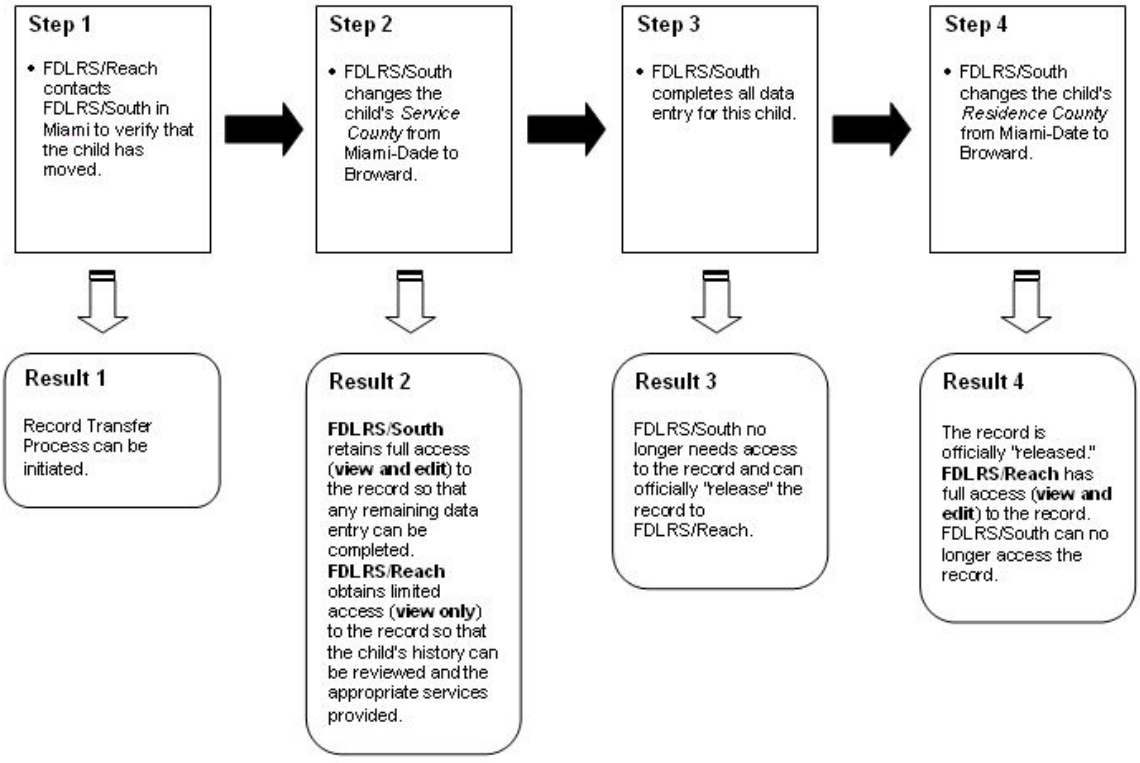
Hands-On Exercise 3: Inactivate a provider and update a contact

1. Select the REPORTS option from the main menu.
2. Select the DEFINITIONS option.
3. Select the PROVIDERS & CONTACTS option.
4. Select the FIND option from the menu.
5. Enter the following information:
   Provider Name: Miami Care Center
6. Press the Enter key on the keyboard to perform the find.
7. Edit the *Provider Type* and *Contact Phone Number*.
   Provider Type: X (Inactive)
   Phone Number: (305) 234-6868
   Note: Changes are immediately saved.
8. Select the EXIT option from the menu.

Record Transfer

When children move from one county to another, data facilitators have the ability to grant record access to other counties (upon request). Record access is granted based on the *Residence County* field. Users in the county specified in the *Residence County* field have full access (view and edit) to records. Users in the county specified in the *Service County* field (if different from the *Residence County*) have "view-only" access to records. The record transfer process, as described below in detail (see Figure 7), enables the sharing of data between FDLRS sites and eventually facilitates the complete transfer of data to the FDLRS center in the new *Residence County* of the child.

FIGURE 7 **Child moves from Miami (FLDRS/South) to Ft. Lauderdale (FDLRS/Reach)**

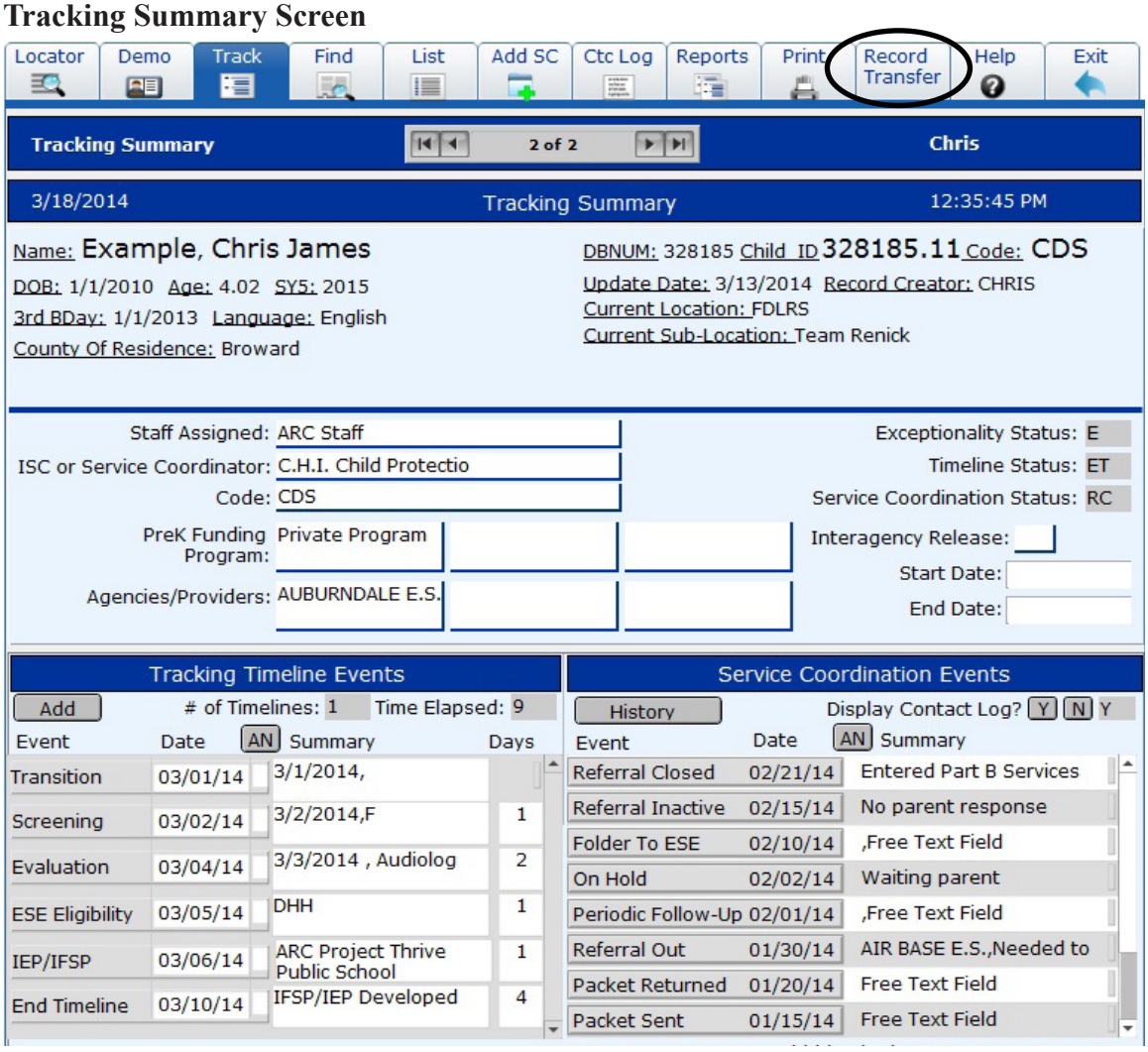

Step 1
• FDLRS/Reach contacts FDLRS/South in Miami to verify that the child has moved.
Step 2
• FDLRS/South changes the child's *Service County* from Miami-Dade to Broward.
Step 3
• FDLRS/South completes all data entry for this child.
Step 4
• FDLRS/South changes the child's *Residence County* from Miami-Date to Broward.
Result 1
Record Transfer Process can be initiated.
Result 2
FDLRS/South retains full access (**view and edit**) to the record so that any remaining data entry can be completed. **FDLRS/Reach** obtains limited access (**view only**) to the record so that the child's history can be reviewed and the appropriate services provided.
Result 3
FDLRS/South no longer needs access to the record and can officially "release" the record to FDLRS/Reach.
Result 4
The record is officially "released." **FDLRS/Reach** has full access (**view and edit**) to the record. FDLRS/South can no longer access the record.

Service County

Changing the *Service County* will give view-only access to the users in the county listed. Full privileges (view and edit) are limited to users in the child's *Residence County*. To change the *Service County* in a child's record, complete the following steps:

Step 1. Select a child using the **Child Record Locator** screen. The RECORD TRANSFER option is displayed in the main menu of the **Tracking Summary** and **Demographic** screens (see Figure 8).

FIGURE 8 **Tracking Summary Screen**

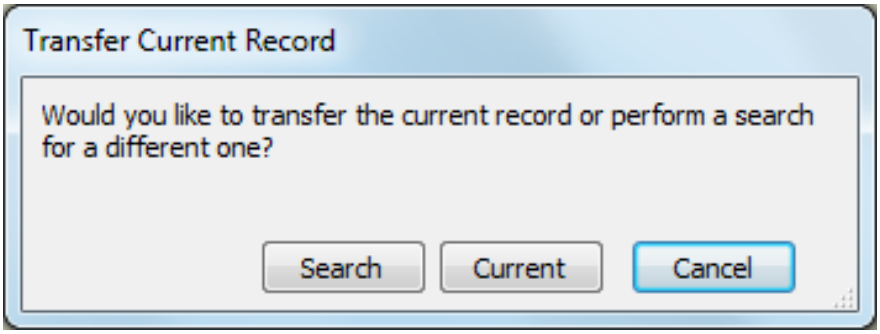


NOTE

The RECORD TRANSFER option is visible to all users, but only data facilitators can transfer a record.

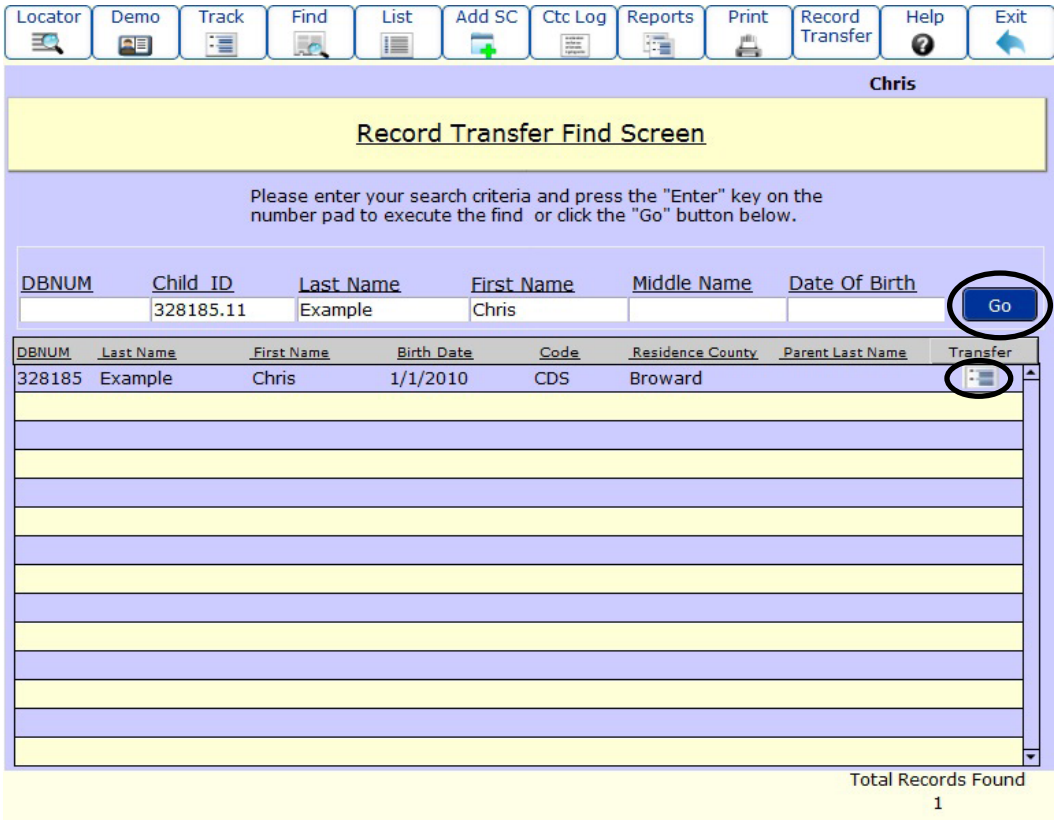
Step 2. Select the RECORD TRANSFER option from the main menu. Data facilitators can either transfer the current record or search for a new record to transfer (see Figure 9).

FIGURE 9 **Record Transfer Options**


Transfer Current Record
Would you like to transfer the current record or perform a search for a different one?
Search
Current
Cancel

Step 3. For this example, search for a new record to transfer. Select the SEARCH option. The **Record Transfer Find** screen will be displayed (see Figure 10).

FIGURE 10 **Record Transfer Find Screen**

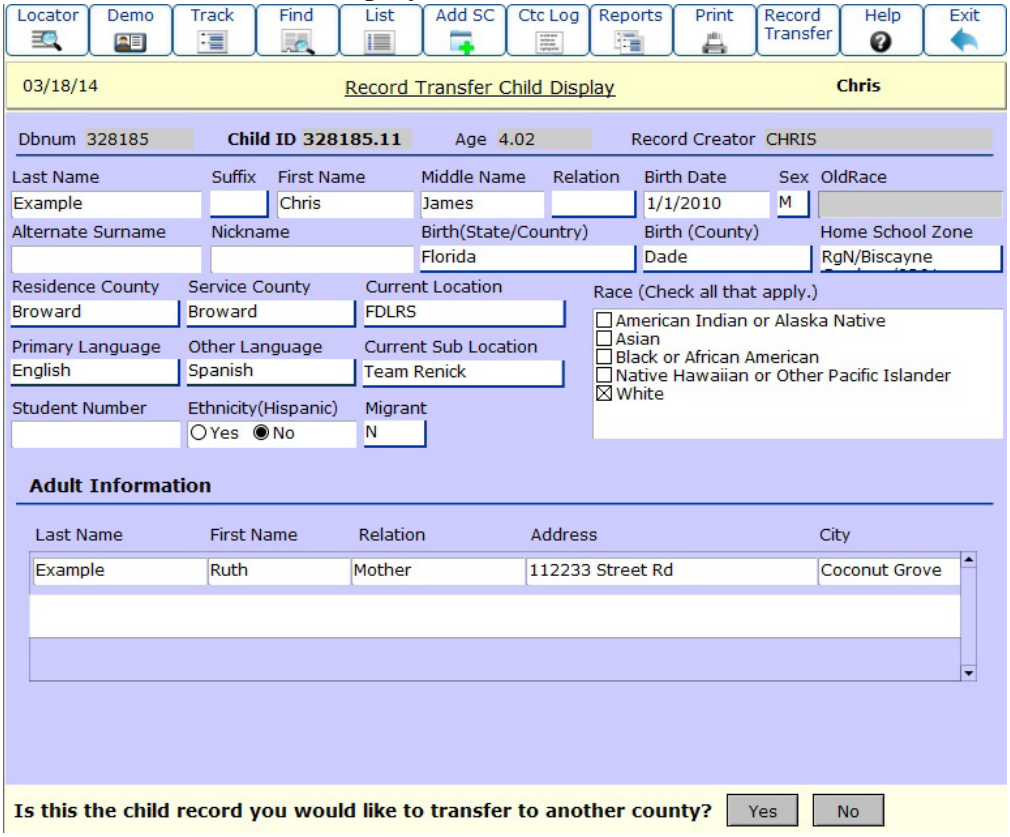


Step 4. Enter the search criteria in the appropriate fields to locate the child whose record needs to be transferred.

Step 5. Select the GO option.

Step 6. Select the TRANSFER option next to the child's record. The **Record Transfer Child Display** screen will be displayed (see Figure 11).

FIGURE 11 **Record Transfer Child Display Screen**



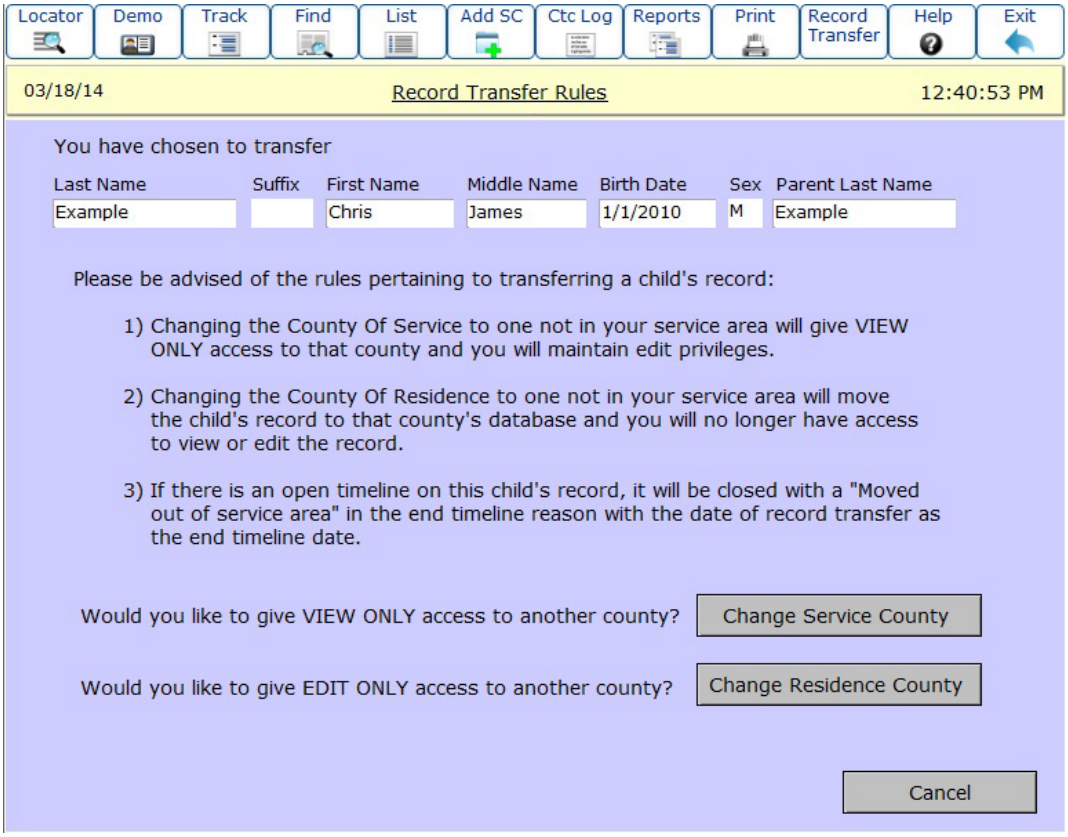
Step 7. Verify that this is the correct child's record to be transferred.

Options

- YES – Confirms that this is the correct child's record to be transferred
- NO – Returns to the **Child Demographic Information** screen

Step 8. Select the YES option. The **Record Transfer Rules** screen will be displayed (see Figure 12).

FIGURE 12 **Record Transfer Rules Screen**

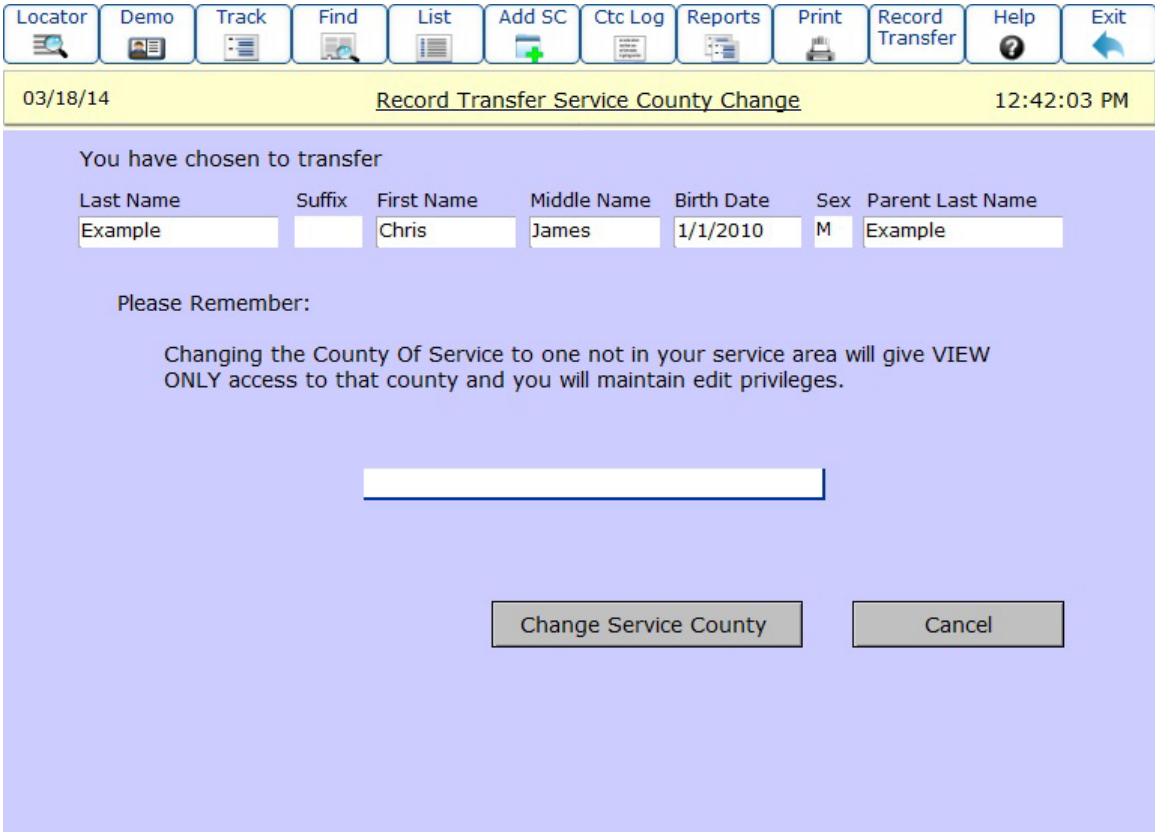

Locator
Demo
Track
Find
List
Add SC
Ctc Log
Reports
Print
Record Transfer
Help
Exit
03/18/14
Record Transfer Rules
12:40:53 PM
You have chosen to transfer
Last Name
Suffix
First Name
Middle Name
Birth Date
Sex
Parent Last Name
Example
Chris
James
1/1/2010
M
Example
Please be advised of the rules pertaining to transferring a child's record:
1) Changing the County Of Service to one not in your service area will give VIEW ONLY access to that county and you will maintain edit privileges.
2) Changing the County Of Residence to one not in your service area will move the child's record to that county's database and you will no longer have access to view or edit the record.
3) If there is an open timeline on this child's record, it will be closed with a "Moved out of service area" in the end timeline reason with the date of record transfer as the end timeline date.
Would you like to give VIEW ONLY access to another county?
Change Service County
Would you like to give EDIT ONLY access to another county?
Change Residence County
Cancel

Options

- CHANGE SERVICE COUNTY – Modifies the *Service County* field
- CHANGE RESIDENCE COUNTY – Modifies the *Residence County* field
- CANCEL – Abandons the record transfer process and returns to a blank **Child Record Locator** screen

Step 9. Select the CHANGE SERVICE COUNTY option. The **Record Transfer Service County Change** screen will be displayed (see Figure 13).

FIGURE 13 **Record Transfer Service County Change Screen**



Options

- CHANGE SERVICE COUNTY– Modifies the *Service County* field in the **Child Demographic Information** screen
- CANCEL – Abandons the record transfer process and returns to a blank **Child Record Locator** screen

Step 10. Select a County name from the drop-down list.

Step 11. Select the CHANGE SERVICE COUNTY option. A message prompt will be displayed with the name of the new *Service County* for that record (see Figure 14).

Step 12. Select the OK option. The *Service County* for the child's record has been changed.

FIGURE 14 **Service County Has Been Changed To Message**

Residence County

Changing the *Residence County* will complete the transfer of the child's record to another county. Only the users in the child's *Residence County* will be able to edit that record. To change the *Residence County*, complete the following steps:

Step 1. Select the same child using the **Child Record Locator** screen. The RECORD TRANSFER option is displayed in the main menu of the **Tracking Summary** and **Demographic** screens (see Figure 8).

Step 2. Select the RECORD TRANSFER option from the main menu.

Step 3. For this example, use the record that was already selected. Select the CURRENT option. The **Record Transfer Find** screen will be displayed with the current record's information (see Figure 10).

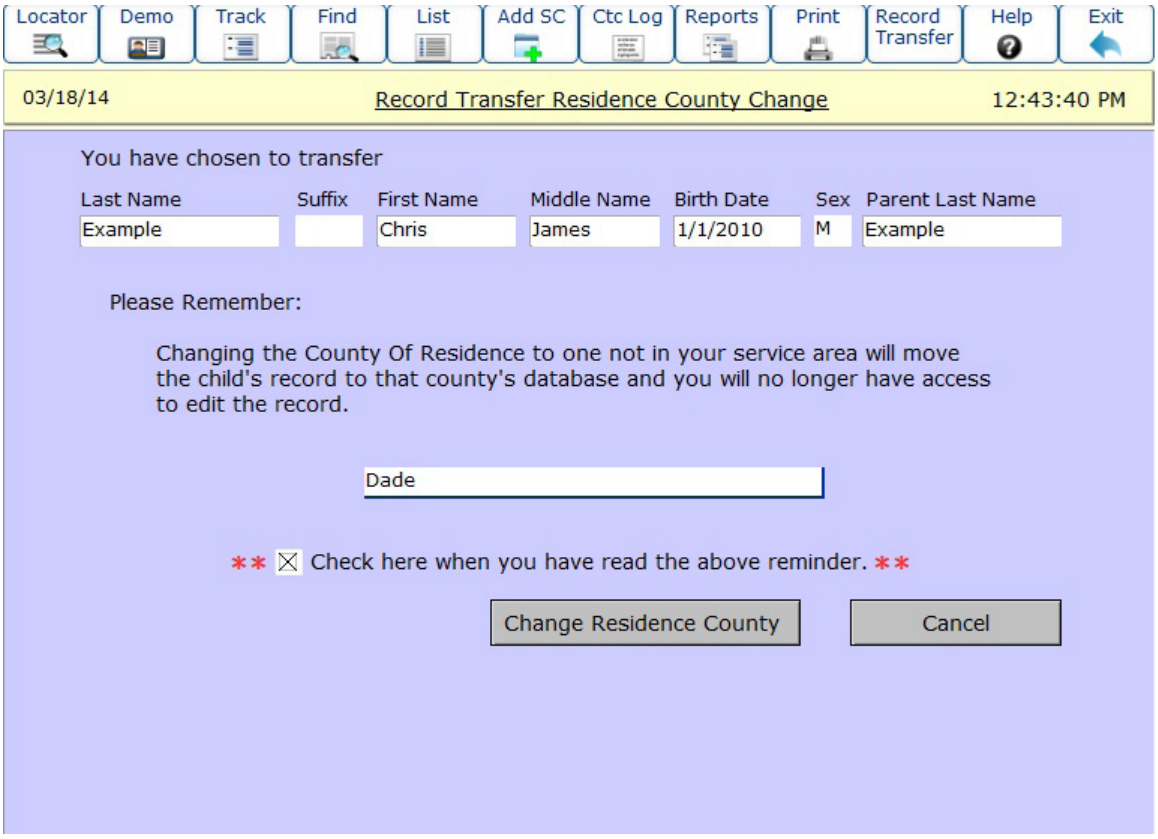
Step 4. Select the TRANSFER option next to the child's record to be transferred. The **Record Transfer Child Display** screen will be displayed (see Figure 11).

Step 5. Verify that this is the correct child's record to be transferred.

Step 6. Select the YES option. The **Record Transfer Rules** screen will be displayed (see Figure 12).

Step 7. Select the CHANGE RESIDENCE COUNTY option. The **Record Transfer Residence County Change** screen will be displayed (see Figure 15).

FIGURE 15 **Record Transfer Residence County Change Screen**



Options

- CHANGE RESIDENCE COUNTY – Modifies the *Residence County* field in the **Child Demographic Information** screen
- CANCEL – Abandons the record transfer process and returns to a blank **Child Record Locator** screen

Step 8. Select a County name from the drop-down list.

Step 9. Select the checkbox below to mark an "X." (This checkbox is required to proceed.)

County of Residence Has Been Changed To Message

FIGURE 16

Step 10. Select the CHANGE RESIDENCE COUNTY option. A message prompt will be displayed with the name of the new *Residence County* for that record (see Figure 16).

Step 11. Select the OK option. The record has been transferred to the new *Residence County* selected.

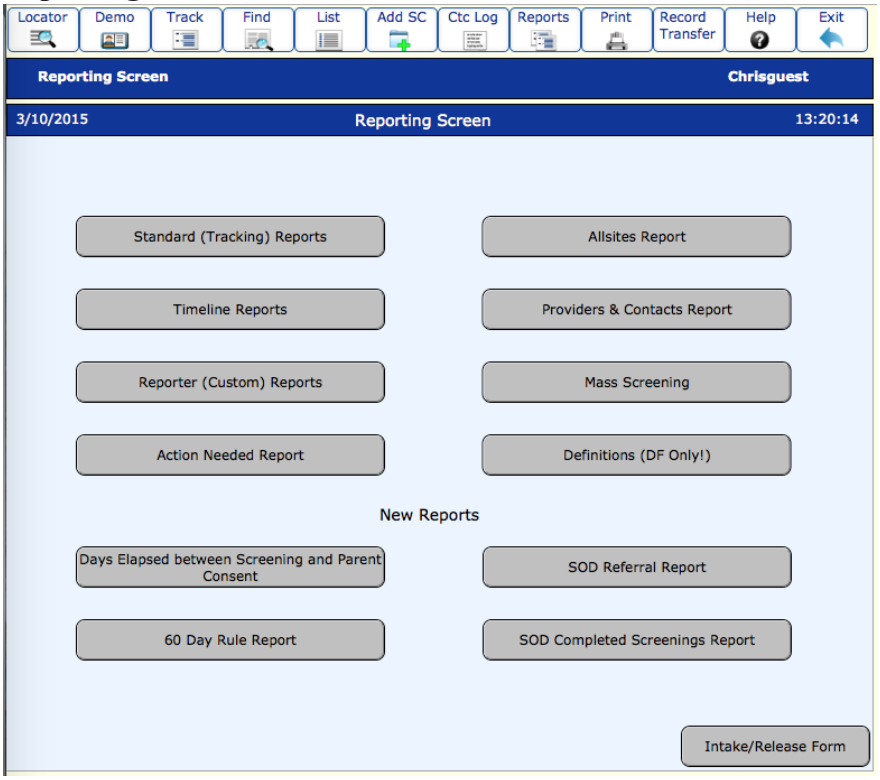
Hands-On Exercise 4: Transfer a child's record

1. Select the LOCATOR option from the main menu.
2. Enter the following information:
   Last Name: Abs
   First Name: Katie
3. Select the DEMO option to select the record.
4. Select the RECORD TRANSFER option from the main menu.
5. Select the CURRENT option.
6. Select the TRANSFER option.
7. Verify the child's demographic information and select the YES option.
8. Select the CHANGE SERVICE COUNTY option.
9. Select Baker from the drop-down list.
10. Select the CHANGE SERVICE COUNTY option (see message).
11. Select the OK option.
    Note: Baker county now can view (not edit) this child's record.
12. Select the record again using the **Child Record Locator** screen.
13. Select the RECORD TRANSFER option from the main menu.
14. Select the CURRENT option.
15. Select the TRANSFER option.
16. Verify the child's demographic information and select the YES option.
17. Select the CHANGE RESIDENCE COUNTY option.
18. Select Baker from the drop-down list and mark the checkbox.
19. Select the CHANGE RESIDENCE COUNTY option.
20. Select the checkbox below to mark an "X."
21. Select the CHANGE RESIDENCE COUNTY option.

Reports

The REPORTS option is used to generate standard and customized reports. The data facilitator should be familiar with standard report options such as: Tracking, Timeline, Action Needed, Allsites, Providers & Contacts, and Mass Screening reports (see Figure 17). Data facilitators should provide users with on-site support for report generation.

FIGURE 17 **Reporting Screen**



Reporter

The Reporter program is used to generate customized reports in CHRIS. It provides the flexibility to create layouts or to modify existing layouts. In addition, Reporter allows the creation of FileMaker scripts that can be customized to facilitate performing finds, sorting, and printing.

Reporter has no permission restrictions and is available to all CHRIS users; however, the creation of reports should only be performed by trained personnel. A basic understanding of the CHRIS program and the FileMaker Pro application is required to design custom reports. Typically, the data facilitator regulates the usage, creation, and uniformity of site-specific reports.

The CHRIS *Reports Manual* and *Advanced Reports Manual* are available on the CHRIS website at http://www.chris.miami.edu. Users can also contact the CHRIS Help Desk to schedule a Reports Training session to learn more about using the CHRIS Reporter.

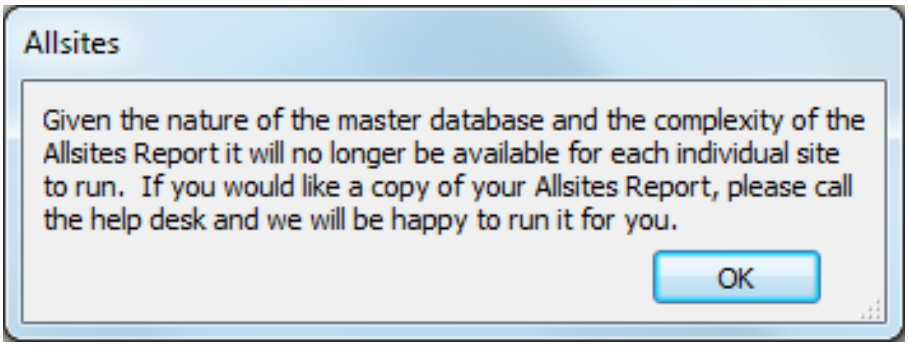
Allsites Report

The Allsites Report provides a summary of FDLRS Child Find activities by month and year for the three previous school years. Reports can be generated by center, county, or site.

Two types of reports can be generated: Workload and Unduplicated. The Workload Report is based on a set of seven events and counts the total number of those events. The Unduplicated Report is based on six events and counts the total number of children served. For instance, if a child has two Screening events, the child would count only once in the Unduplicated Report, but both Screening events would be counted in the Workload Report.

Due to the complexity of these reports, only the CHRIS Help Desk can generate Allsites Reports. If a user selects the ALLSITES REPORT option from the **Reporting** screen, a message will be displayed indicating that this report must be run by the Help Desk (see Figure 18). The data facilitator is responsible for contacting the Help Desk to request an Allsites Report.

FIGURE 18 **Allsites Report Message**


Allsites
Given the nature of the master database and the complexity of the Allsites Report it will no longer be available for each individual site to run. If you would like a copy of your Allsites Report, please call the help desk and we will be happy to run it for you.
OK

Workload Report

The Workload Report is based on a set of seven events. This includes the total number of Referral First Contact with FDLRS (*First Contact with FDLRS Date*), Referral In (*Referral In Date*), Transition (*Part C to Part B Transition Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individual Education Plan/Individual Family Service Plan (*IEP/IFSP Date*) events for each school year (see Figure 19).

FIGURE 19 **Allsites Workload Report**

Center Comparative 3 Year Workload Report

Report Date: 03/10/15
Report Time: 3:40:20 PM

Sum Of Count		Month												
Category	**Year**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Grand Total**
First Contact	12 / 13	212	240	264	385	260	192	274	270	194	272	219	136	2918
First Contact	13 / 14	194	234	226	296	251	175	241	266	260	236	238	150	2767
First Contact	14 / 15	169	205	259	254	206	144	259	240	59	-	-	-	1795
First Contact	**Total**	575	679	749	935	717	511	774	776	513	508	457	286	7480
Referral In	12 / 13	16	17	19	22	31	14	27	22	18	28	15	15	244
Referral In	13 / 14	12	15	22	19	17	17	27	31	22	20	20	18	240
Referral In	14 / 15	21	25	24	28	17	18	25	29	-	-	-	-	196
Referral In	**Total**	49	57	65	69	65	49	79	82	49	48	35	33	680
Transition	12 / 13	-	21	48	78	61	44	42	76	53	73	85	58	646
Transition	13 / 14	38	40	68	68	57	55	48	59	54	84	86	28	685
Transition	14 / 15	32	31	41	60	49	29	32	18	-	-	-	-	302
Transition	**Total**	77	92	157	206	167	128	122	153	117	157	171	86	1633
Screening	12 / 13	66	67	219	311	232	130	217	214	199	283	183	50	2171
Screening	13 / 14	36	93	225	283	254	154	192	274	239	211	237	174	2372
Screening	14 / 15	138	65	137	233	136	161	186	172	19	-	-	-	1247
Screening	**Total**	240	225	581	827	622	445	595	660	457	494	420	224	5790
Evaluation	12 / 13	81	50	156	207	169	127	163	175	143	214	180	60	1725
Evaluation	13 / 14	38	98	187	194	184	124	186	185	161	219	211	95	1882
Evaluation	14 / 15	113	80	183	190	127	128	154	96	-	-	-	-	1074
Evaluation	**Total**	232	228	526	591	480	379	503	456	307	433	391	155	4681
ESE Eligibility	12 / 13	31	59	130	171	171	155	143	175	163	189	218	116	1721
ESE Eligibility	13 / 14	41	70	147	212	146	143	168	185	155	213	220	133	1833
ESE Eligibility	14 / 15	100	96	163	178	140	123	160	142	49	-	-	-	1151
ESE Eligibility	**Total**	172	225	440	561	457	421	471	502	367	402	438	249	4705
IEP/IFSP	12 / 13	29	54	112	159	161	138	127	153	145	171	200	104	1553
IEP/IFSP	13 / 14	38	63	123	188	130	136	151	160	140	194	206	120	1649
IEP/IFSP	14 / 15	89	84	147	164	131	111	141	126	44	-	-	-	1037
IEP/IFSP	**Total**	156	201	382	511	422	385	419	439	329	365	406	224	4239

Records Transferred In During School Year: 14/15 35
Records Transferred Out During School Year: 14/15 27

Unduplicated Report

The Unduplicated Report is based on the number of children served and contains the total number of children who have a Referral First Contact with FDLRS (*First Contact with FDLRS Date*), Transition (*Part C to Part B Transition Notification Date*), Screening (*Screening Final Result Date*), Evaluation (*Final Result Date*), Exceptional Student Education Eligibility (*ESE Eligibility Date*), and Individal Education Plan/Individual Family Service Plan (*IEP/IFSP Date*) event for each school year (see Figure 20).

FIGURE 20 **Allsites Unduplicated Report**

Center Comparative 3 Year Unduplicated Report

Report Date: 03/10/15
Report Time: 3:29:29 PM

Sum Of Count		Month												
Category	**Year**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Grand Total**
First Contact	12 / 13	212	240	264	385	260	192	274	270	194	272	219	136	2918
First Contact	13 / 14	194	234	226	296	251	175	241	266	260	236	238	150	2767
First Contact	14 / 15	169	205	259	254	206	144	259	240	66	-	-	-	1802
First Contact	**Total**	575	679	749	935	717	511	774	776	520	508	457	286	7487
Transition	12 / 13	-	21	48	78	61	44	42	76	53	73	85	58	646
Transition	13 / 14	38	40	68	68	57	55	48	59	54	84	86	28	685
Transition	14 / 15	32	31	41	60	49	29	33	18	11	-	-	-	304
Transition	**Total**	77	92	157	206	167	128	123	153	118	157	171	86	1635
Screening	12 / 13	64	67	218	310	231	129	218	218	198	286	194	57	2190
Screening	13 / 14	36	94	225	283	253	154	193	276	239	210	237	174	2374
Screening	14 / 15	138	65	137	233	136	163	186	174	31	-	-	-	1263
Screening	**Total**	238	226	580	826	620	446	597	668	468	496	431	231	5827
Evaluation	12 / 13	77	51	156	207	168	127	163	176	141	214	183	59	1722
Evaluation	13 / 14	38	98	187	195	184	124	186	185	161	220	211	95	1884
Evaluation	14 / 15	113	80	183	190	127	128	154	99	-	-	-	-	1077
Evaluation	**Total**	228	229	526	592	479	379	503	460	305	434	394	154	4683
ESE Eligibility	12 / 13	32	59	131	171	169	155	143	175	162	188	219	116	1720
ESE Eligibility	13 / 14	41	70	147	212	147	143	168	185	155	213	221	133	1835
ESE Eligibility	14 / 15	100	96	163	178	140	123	160	142	54	-	-	-	1156
ESE Eligibility	**Total**	173	225	441	561	456	421	471	502	371	401	440	249	4711
IEP/IFSP	12 / 13	30	54	113	159	160	138	127	153	144	171	200	104	1553
IEP/IFSP	13 / 14	38	63	123	188	131	136	151	160	140	194	206	120	1650
IEP/IFSP	14 / 15	89	84	147	164	131	111	141	126	49	-	-	-	1042
IEP/IFSP	**Total**	157	201	383	511	422	385	419	439	333	365	406	224	4245

Records Transferred In During School Year: **14/15** **35**
Records Transferred Out During School Year: **14/15** **27**

The Allsites report provides a summary of FDLRS Child Find activities by month and year for the three previous school yea
Reports can be generated by center, county, or site. Two types of reports can be generated: Workload and Unduplicated. T
Workload report is based on a set of seven events, and the Unduplicated report is based on the total number of children serv
For instance, if a child was screened twice, the child would count only once in the Unduplicated report, but both screen
events would be counted in the Workload report.

Find Criteria:
First Contact - First Contact with FDLRS Date
Referral In (Workload Only) - Referral In Date
Transition - Transition Meeting Date or PartC to Part B Referral Date
Screening - Date of Final Result
Evaluation - Completion Date
ESE Eligibility - ESE Eligibility Date
IEP/IFSP - IEP/IFSP Date

Duplicate Records

Duplicate records are problematic because they cause data entry and reporting errors. If a duplicate record is found in the database, it should be marked for deletion. Data facilitators are responsible for marking duplicate records for deletion. Permanent deletion of records can only be done by the Help Desk.

Marking Duplicate Records for Deletion

To mark records that need to be deleted by the Help Desk, complete the following steps:

Step 1. Select the LOCATOR option from the main menu.

Step 2. Enter the search criteria in the appropriate fields to locate the record that needs to be marked for deletion.

Step 3. Select the GO option.

Step 4. Select the DEMO option next to the record to be marked for deletion. The child's demographic information will be displayed.

Step 5. Delete the *Last Name* values. Enter "DUPLICATE" in the *Last Name* field.

It is also recommended that data facilitators print out a list of duplicate child records to be deleted and child records to be kept in the database. This report can be emailed to the Help Desk at chris.um@miami.edu for further review. In addition, data facilitators should compare the duplicate and the matching records to make sure all appropriate events are created in the child's record that will be kept.